

- From the Project Portal/ CONNECT Center; navigate to the Deliverables Management Portal

This tab shows you what project you are on

Click on Deliverables Management to access the Deliverables Management Portal

The screenshot shows the ProjectWise interface. At the top, there's a navigation bar with tabs like Home, Virginia DOT, Assets, Projects, and a dropdown menu for 'Design Build PWDM practice environment'. Below this, the main content area is divided into sections: Project Details (Registered: Monday, July 15, 2019; Registered By: Julia Simo; Industry: Roads and Highways; Asset Type: Roads; Location: Not Specified; Project Country: US; Time Zone: Not Specified; Data Center Location: East US), Team Members (Anthony Gibson, Bonnie Trent, Brian Treacy, Carl Kaczmarek, Cassandra Goodnough), Notifications (Jeffrey Wijet from Virginia DOT added you to the '82513 Civil Rights' project; Jeffrey Wijet from Virginia DOT added you to the 'The 622 over Norfolk Southern' project; Julia Simo from Virginia DOT added you to the 'PWDM practice environment' project), ProjectWise 365 Services (Share, Deliverables Management, Forms, Optioneering Center), and Optioneering Services.

- On the Deliverables Management Portal, to create a NEW AND OFFICIAL SUBMITTAL

Click on New

Here you can navigate to existing submittals

You can filter through submittal types

You can search and filter through submittals

The screenshot shows the Deliverables Management portal. At the top, there's a navigation bar with tabs like Home, Virginia DOT, Assets, Projects, and a dropdown menu for 'Design Build PWDM practice environment'. Below this, the main content area is divided into sections: Deliverables Management (Incoming (1), Outgoing, Drafts), Acknowledge selected (Show all types), and a table of submittals. The table has columns for Subject, Purpose, Status, Progress, and Actions. The first row shows an 'Error' submittal for 'ID Design Build-TR-0000007 - B' with a status of 'For Review and Approval' and a progress of '0 / 1'. The second row shows a 'Test - Civil Rights' submittal for 'ID Design Build-TR-0000001' with a status of 'For Review and Approval' and a progress of '1 / 1'. The third row shows a 'MOT Phase II Plans' submittal for '07 Design Documents' with a status of 'For Review and' and a progress of '1 / 1'.

PWDM - Creating a New Submittal / Transmittal

- Select New Transmittal

The screenshot shows the 'Deliverables Management' interface. A red arrow points to the 'New Transmittal' dropdown menu, which is open, showing options: 'New Transmittal', 'New RFI', and 'New General Correspondence'. The 'New Transmittal' option is highlighted. Below the menu, a table lists existing deliverables with columns for Subject, Classification, Issued, Purpose, Status, Progress, and Actions.

- Follow the next steps to create an official submittal

The screenshot shows the 'Transmittal draft' form. Red annotations provide instructions for each field:

- General:** Start by filling out the General Transmittal information.
- Subject:** Fill out the Subject line, following the naming convention established by the Project Team.
- Purpose:** Select the purpose "For Review and Approval" or "For Information".
- Distribution rule:** Select the Distribution rule to pre-populate the recipients as agreed on by the Project Team.
- Comments:** Add comments as appropriate.
- Classification:** Select a submittal classification as agreed upon by the Project Team.
- Cover letter:** A standard Cover Letter gets created by the system.

The form includes fields for Project, Subject, Purpose, Distribution rule, Comments, Classification, and Cover letter. There are also buttons for 'Issue', 'Save draft', and 'Close'.

PWDM - Creating a New Submittal / Transmittal

https://connect-btsportal.bentley.com/5ca22831-71c8-4f1f-9c08-96a039f6550/Projects/5ca22831-71c8-4f1f-9c08-96a039f6550/Drafts/Transmittals/00000000-0000-0000-0000-000000000000#recipients

Home Virginia DOT Assets Projects Design Build PWDM practice environment

Deliverables management > Drafts > new

Transmittal draft

General Recipients Documents

Add...

The recipients tab is automatically populated based on the distribution rule that was agreed upon by the Project team

Recipient	Ack	Resp	Comments	Company	Title
Jeremy Kitto jeremy.kitto@vdot.virginia.gov	<input type="checkbox"/>	<input type="checkbox"/>		Virginia DOT PWDM practice environment	Project Administrator
Jeffrey Wyatt jeff.wyatt@vdot.virginia.gov	<input type="checkbox"/>	<input type="checkbox"/>		Virginia DOT PWDM practice environment	Team Member
Julia Simo julia.simo@vdot.virginia.gov	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Virginia DOT PWDM practice environment	Project Manager
Dakota Clifford dakota.clifford@vdot.virginia.gov	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Virginia DOT PWDM practice environment	Custom

How do I set and track Acknowledgement and Response?

Issue Save draft Close

If you need to add additional recipients click on "Add..."

The checked boxes indicate who is required to "Acknowledge" and "Respond"

https://connect-btsportal.bentley.com/5ca22831-71c8-4f1f-9c08-96a039f6550/Projects/5ca22831-71c8-4f1f-9c08-96a039f6550/Drafts/Transmittals/7abdf26f-39d7-4e5e-8653-0dd8c92a61f2#recipients

Home Virginia DOT Assets Projects Design Build PWDM practice environment

Deliverables management > Drafts > Design Build-TR-0000012

Transmittal draft

General Recipients Documents Scheduling

Add...

Add recipients

Search Show all

To add recipients you can search and filter through the project team

Recipient	Company	Title
agnieszka.howe@vdot.virginia.gov agnieszka.howe@vdot.virginia.gov	Virgin PWDM	
Anthony Gibson anthony.gibson@vdot.virginia.gov	Virgin PWDM	
bobby.mullenax@vdot.virginia.gov bobby.mullenax@vdot.virginia.gov	Virginia DOT PWDM practice environment	Custom
Bonnie Trent bragsdale.trent@vdot.virginia.gov	Virginia DOT PWDM practice environment	Custom

Invite new Add selected Cancel

PWDM - Creating a New Submittal / Transmittal

The screenshot shows the 'Transmittal draft' page in the VDOT Connect portal. The 'Documents' tab is selected and highlighted with a red box. A red arrow points to this tab with the text 'Add Documents through the Documents tab'. Below the tabs, there are two main sections: 'Upload a ZIP package' and 'Upload individual files'. In the 'Upload individual files' section, the 'Add files...' button is highlighted with a red box. A red arrow points to this button with the text 'Click on "Add files..." You can add multiple documents at once'. At the bottom of the page, there are buttons for 'Issue', 'Save draft', and 'Close'.

The screenshot shows a file explorer window open over the VDOT Connect portal. The file explorer is displaying a directory structure with various files and folders. A red box highlights the 'Open' button at the bottom right of the file explorer. A red arrow points to this button with the text 'Once the files are selected, click "Open"'. Another red arrow points to the file list with the text 'Navigate through to the files you want to upload as part of this Submittal. Keep in mind to follow a file naming convention agreed upon by the Project Team'. The file list shows several PDF documents with names like '298-35_001', '298-35_002', etc.

PWDM - Creating a New Submittal / Transmittal



The screenshot displays the VDOT PWDM portal interface. The top navigation bar includes links for Home, Virginia DOT, Assets, Projects, and Design Build PWDM practice environment. The main content area shows a 'Transmittal draft' for 'Design Build-TR-0000012'. The 'Documents' tab is active, showing a list of files: '0005-127-957 C501.pdf' and '298-35.pdf'. A red box highlights the 'Add files...' button, with an arrow pointing to it and the text 'Add additional files, folders, and delete uploaded files'. Another red box highlights the file list, with an arrow pointing to it and the text 'Select Files'. A third red box highlights the file details section, with an arrow pointing to it and the text 'Expand to additional file metadata'. A fourth red box highlights the 'Scheduling' tab, with an arrow pointing to it and the text 'The scheduling tab is prepopulated based on the calendar days determined by the Project Team. Information can be modified as agreed upon by the Project Team'. The 'Scheduling' tab shows fields for 'Planned Issue', 'Issue date', 'Send reminder', 'Acknowledgement due date', 'Response due date', 'Days after issue', 'Fixed date', and 'Send reminder'.

Documents management > Drafts > Design Build-TR-0000012

Transmittal draft
Draft ID: Design Build-TR-0000012

General Recipients Documents Scheduling

Add files... New folder

Select Files

Expand to additional file metadata

Additional file metadata determined by the project team, this can be in the form of drop down fields or text fields

The scheduling tab is prepopulated based on the calendar days determined by the Project Team. Information can be modified as agreed upon by the Project Team

Planned Issue

Issue date

Send reminder

Acknowledgement due date

Response due date

Days after issue

Fixed date

Send reminder

Issue Save draft Close

- Once the submittal is ready click on ISSUE

PWDM - Creating a New Submittal / Transmittal

Transmittal draft
Draft ID Design Build-TR-0000012

General Recipients Documents Scheduling Responses

Project PWDM practice environment

Subject * Phase 2 MOT Plans

Purpose * For Review and Approval

Distribution rule

Comments This is the first submittal of the Maintenance of Traffic Plans for Phase 2

Classification * 07 Design Documents Submittals

Cover letter Review and Approval Transmittal Cover Letter.xlsx - Review and Approval Transmittal Cover Letter Change...

Status
Draft
Created by: Julia Simo 08/05/2019 11:06 AM EDT
Last modified by: Julia Simo 08/05/2019 11:07 AM EDT

Issue Save draft Close

Confirm Issue

You are about to issue the package.
Before you proceed, you might want to review the automatically generated transmittal cover letter.

[View cover letter](#)

Confirm Cancel

A generic cover letter gets generated, click on the link to review the submittal information, documents, recipients

Click CONFIRM

The submittal has been created.

The recipients that were identified will be receiving a generic email that lets them know a submittal came through.

You will be able to view your submittal on the “outgoing” tab and you will receive an email once there is a new action in the submittal. To view the details and status of the submittal, follow the steps below.

PWDM - Creating a New Submittal / Transmittal



- Click on the Outgoing Tab and navigate to the submittal you want to see details for

The screenshot shows the Deliverables Management system interface. The top navigation bar includes tabs for Incoming (2), Outgoing, and Drafts. The Outgoing tab is selected. Below the tabs, there is a search bar and a dropdown menu for 'Show all types'. A table lists submittals with columns for Subject, Classification, Sent, Purpose, Status, Progress, and Actions. The first submittal is 'BXXX - Demolition Plan' with a status of '14 days acknowledgement overdue'. The second submittal is 'Testing ID Design Build-TR-0000006' with a status of '4 days acknowledgement overdue'. The third submittal is 'Error ID Design Build-TR-000' with a status of '4 days acknowledgement overdue'. The fourth submittal is 'asfd ID Design Build-TR-0000012' with a status of '4 days acknowledgement overdue'. The fifth submittal is 'Phase 2 MOT Plans' with a status of '3 days to acknowledge'. The sixth submittal is 'test ID Design Build-TR-0000005' with a status of 'Acknowledged'.

Click on the Outgoing tab

Filter and search through submittals

Click on the submittal link for additional details

View some submittal details

Navigate through the tabs for submittal details

Click on the arrow for additional options

Download responses

General Recipients Documents Scheduling Responses

Project PWDM practice environment

Subject Phase 2 MOT Plans

Issued by Julia Simo <julia.simo@vdot.virginia.gov>

Issue date 08/05/2019 11:32 AM EDT

Purpose For Review and Approval

Comments This is the first submittal of the Maintenance of Traffic Plans for Phase 2

Classification 07 Design Documents Submittals

Cover letter Cover letter - Design Build-TR-0000012.pdf

Status

Acknowledgement

3 days to acknowledge

Recipients acknowledged: 0 out of 2

Due date: 08/08/2019 11:32 AM EDT

Response

21 days to respond

Recipients responded: 0 out of 2

Due date: 08/26/2019 11:32 AM EDT

Issued by Julia Simo

Issue date 08/05/2019 11:32 AM EDT

PWDM - Creating a New Submittal / Transmittal



https://connect-btsportal.bentley.com/5ca22831-71c8-4f1f-9c08-96a039f6550/Projects/5ca22831-71c8-4f1f-9c08-96a039f6550/Outgoing/Transmittals/7abd26f-39d7-4e5e-8653-0dd8c92a6112#/general

Home Virginia DOT Assets Projects Design Build PWDM practice environment

Deliverables management > Outgoing > Design Build-TR-0000012

Phase 2 MOT Plans
Issued, ID Design Build-TR-0000012

General Recipients Documents Scheduling Responses

Project PWDM practice environment
Subject Phase 2 MOT Plans
Issued by Julia Simo <julia.simo@vdot.virginia.gov>
Issue date 08/05/2019 11:32 AM EDT
Purpose For Review and Approval
Comments This is the first submittal of the Maintenance of Traffic Plans for Phase 2.
Classification 07 Design Documents Submittals
Cover letter Cover letter - Design Build-TR-0000012.pdf

Due date: 08/08/2019 11:32 AM EDT

Download responses

- Download responses
- Resend new versions
- Use as a template
- Download content
- Archive
- View History
- Recall package

If you want to create a new submittal that is similar, you can use this submittal as a template

Click on View History to see a full history of the status of the submittal, including additional reviewers added